VA TMS Domain Manager and Learning Manager Administrator Course

Session 3: Create and Configure Items and Curricula (Part 2 of 2)

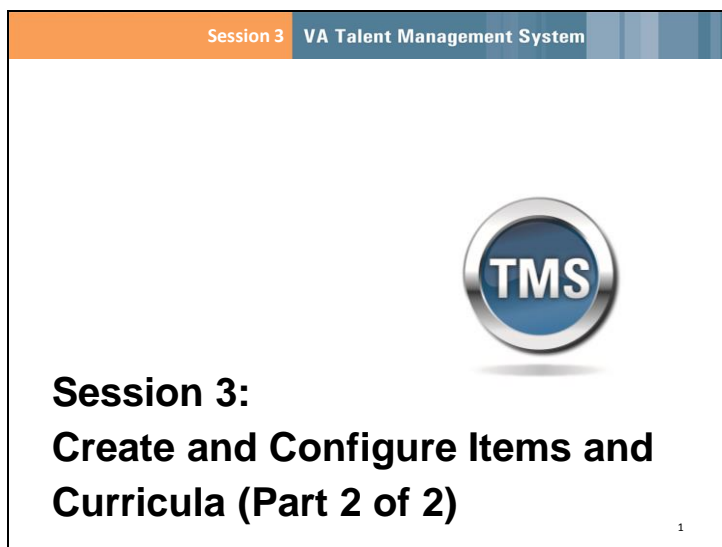Virtual Instructor-Led Training
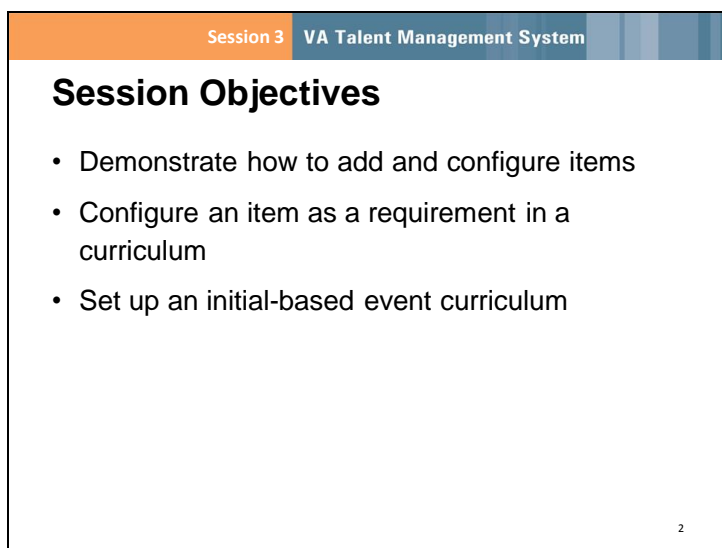
Participant Guide

March 2014

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1.0 Training Content

1.1 *Session 3 Overview*

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Session 3:
Create and Configure Items and Curricula (Part 2 of 2)

Slide 1: Session 3: Create and Configure Items and Curricula (Part 2 of 2)

Notes:

Session Objectives

- Demonstrate how to add and configure items
- Configure an item as a requirement in a curriculum
- Set up an initial-based event curriculum

Slide 2: Session Objectives

Notes:

Session 3 | **VA Talent Management System**

Session 2 Review

- Lesson 1: Relationship of Items, Catalogs, and Curricula

  – Defined basic terminology (items, domain, item classifications)
  – Demonstrated how items are accessed and housed
  – Described types of items

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Slide 3: Session 2 Review

Notes:

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Session 2 Review (Continued)

- Lesson 2: Create and Configure an Item

  – Described the item key
  – Showed the different areas of an item record

- Lesson 3: Substitutes and Prerequisites

  – Defined substitute
  – Established a substitute relationship
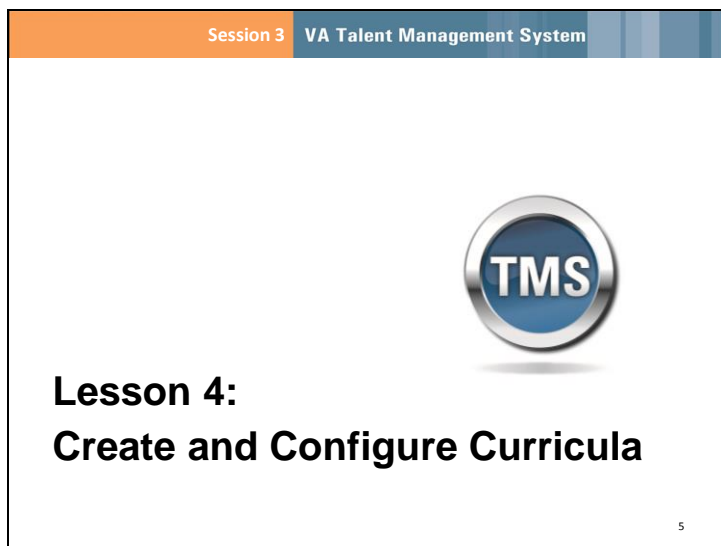 – Established a prerequisite relationship

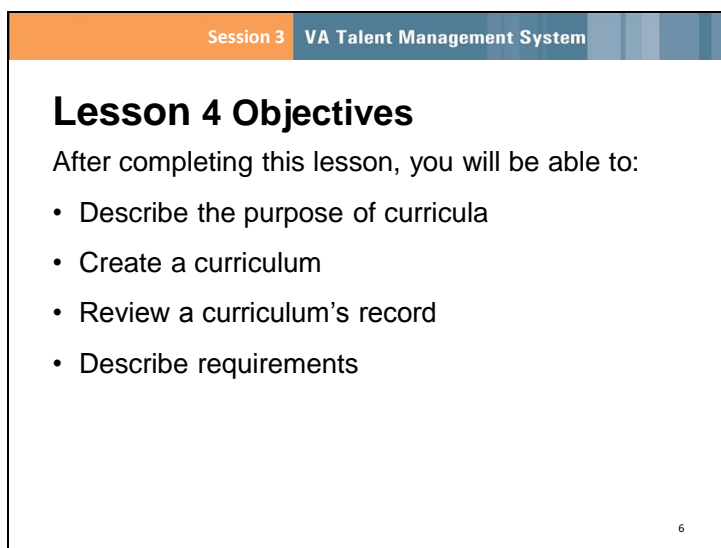 **Questions about Session 2?**

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Slide 4: Session 2 Review (Continued)

1.2 *Lesson 4: Create and Configure Curricula*

Notes:

Slide 5: Lesson 4: Create and Configure Curricula

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Slide 6: Lesson 4 Objectives

Notes:

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Curriculum

- A curriculum is a grouping of one or more items for the purpose of assignment and tracking as a single entity

- Curricula provide the functionality to recalculate required-by dates on items that have been completed but must be repeated on a recurring basis

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Slide 7: Curriculum

Notes:

Session 3	VA Talent Management System

Grouping Items

Curriculum:
- Item A
- Item B
- Item C

_____

Collectively known as

- **Curriculum 1**

User's To-Do List:

- Item A
- Item B
- Item C

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Slide 8: Grouping Items

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Characteristics of Curricula

- Items can be used in one curriculum or multiple curricula with different date and requirement settings in each
- Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned
- Curricula can be linked to a job code or assigned with an assignment profile and are automatically assigned when a user is given that job code or meets the profile attributes
- Curriculum can contain requirements to complete
    - # of hours
    - # of hours from an item pool
    - # of items from an item pool

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Notes:

Slide 9: Characteristics of Curricula

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Curriculum Statuses

Curricula can have one of two statuses:
- Complete:
    - All items are complete
    - The effective date is in the future
    - Requirements have been met
- Incomplete:
    - Newly assigned curriculum with effective date in the past
    - Required items not complete
    - Retraining date has passed
    - Revisions have been made
    - Requirements have not been met

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Notes:

Slide 10: Curriculum Statuses

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VA LEARNING UNIVERSITY

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Curriculum ID

- The Curriculum ID is a unique identifier in the VA TMS database

- The ID naming convention for curricula is:

LLL-XXXX (L=Location/Domain, X=Alpha character)

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Slide 11: Curriculum ID

Session 3	VA Talent Management System

Demonstration:
Add a New Curriculum

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Slide 12: Add a New Curriculum

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Demonstration: Add a New Curriculum

To add new curriculum:

1. Navigate to **Learning** > **Curricula**.
2. Select **Add New**.
   NOTE: You can also enter **Add Curriculum** into the **Search** field below the **Button** bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete** checkbox unchecked.
   NOTE: When you select the **Force Incomplete** checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

Notes:

Slide 13: Activity #1: Add a New Curriculum

Activity #1: Add a New Curriculum

Use the two new items you created in the previous session and create a new curriculum called New Hire Orientation. Associate the two items to this curriculum.

1. Navigate to **Learning > Curricula**.
2. Select **Add New**.

   NOTE: You can also enter **Add Curriculum** into the **Search** field below the **Button** bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete** checkbox unchecked.

   NOTE: When you select the **Force Incomplete** checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

Add items to a curriculum:

1. Using the curriculum created previously, select the **Contents** tab.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Items** from the drop-down menu.
5. Enter criteria in the keyword field to search for the items to include in the curriculum.
6. Select **Search**.
7. Check the **Add** checkbox next to each item to add to the curriculum.
8. Select **Add**. The selected item(s) is(are) added to the contents list.
9. Select the **Edit** link next to the last listed item:
   a. Enter initial assignments.
   b. Select an initial basis.

  c. Do not enter retraining assignments.

  d. Enter a basis date and an effective date.

  e. Select an assignment type.

10. Select **Apply Changes**.

11. Select the **Move Up** arrow and **Move Down** arrow to sequence the curriculum content. This sets the suggested order display for users.

12. Select the **X** to close the **Edit** window and return to the curriculum record.

The sequence numbers only apply to group instances, which is a part of the TMS designed specifically for the Air Force. This is a function you would not use unless you were to create a group instance. This field sequences the order in which the items would be scheduled within the group instance. The group instance feature is very rarely used within the VA TMS.

Notes:

Curriculum Record

Once a curriculum record is added to the VA TMS, it is organized into functional areas.

Slide 14: Curriculum Record

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Demonstration: Curriculum Record

Slide 15: Curriculum Record

Demonstration: Curriculum Record

Show the following sections on the three main areas of the curriculum record:

Core Area: The **Core** area contains the basic curriculum record information, including curriculum title, ID, description, and type. To edit a field in this area, select in a displayed field and enter text or select a reference value (depending on the field type). Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary
- Extended Summary (used by regulated organizations for CFR21 Part 11)

Related Area: The **Related** area of the curriculum record contains additional information regarding the curriculum. Select the **Related** tab on the left (i.e., Assignment Profiles) to display the details on the right.

Actions Area: The **Actions** area of the curriculum record contains links to additional actions that can be taken on the curriculum record, including:
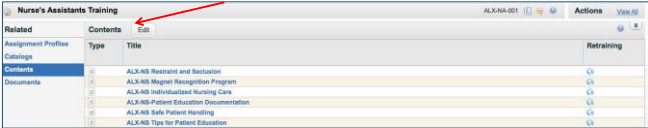
- Assign (initiates the batch assignment wizard)
- Send Notification (initiates the ad hoc notification wizard)
- Copy
- Delete
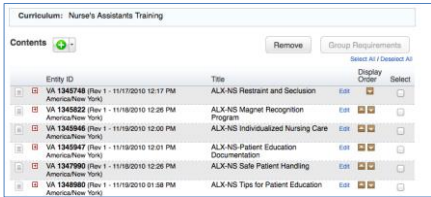
Slide 16: Associating Contents

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Slide 17: Edit Curriculum

Notes:

Notes:

Slide 18:Items

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Slide 19: Requirement-Based Curriculum

Notes:

Session 3 | **VA Talent Management System**

Requirement Types

- # of Hours of specified hour type (any item, scheduled offering, or external event)
  - Total hours
  - Credit hours
  - Contact hours
  - CPE hours
- # Hours of specified hour type from pool of items (only from the defined pool of items)
  - Total hours
  - Credit hours
  - Contact hours
  - CPE hours
- Items from pool of items

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Slide 20: Requirement Types

Notes:

Session 3 | **VA Talent Management System**

Example Requirement

Requirement Type: # of Hours of specified hour type from pool of items

- Curriculum 1 has four items in it:
  - Ethics 101: 4 Credit Hours
  - Ethics 102: 3 Credit Hours
  - Ethics 103: 3 Credit Hours
  - Ethics 104: 2 Credit Hours
- REQUIREMENT: complete a total of six credit hours from curriculum

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Slide 21: Example Requirement

Slide 22: Example Requirement

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Slide 23: Additional Requirement Options

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Slide 24: Subcurricula

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Slide 25: Demonstration: Adding Requirements and
Subcurricula

Notes:

Demonstration: Adding Requirements and Subcurricula

Create a requirement:

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the **Requirement Type** drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active** checkbox checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more** from list link.
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the **Item Pool for Requirement** section.
18. Select **Add**.

Add a requirement to a curriculum:

1. Navigate to **Learning** > **Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the **Related** area.
6. Select **Edit**.
7. Select **Add Content**.
8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Select **Search**.
11. Check **Add** next to each requirement to add.
12. Select **Add**. The new requirement is added to the bottom of the list on the **Curriculum Contents** tab.

13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement "required."

14. Select **Apply Changes**.

15. Optional: To group requirements: If more than one requirement is added to the curriculum, check Select next to the requirements to group.

16. Select **Group Requirements**.

17. Enter group description, initial training, retraining assignment information, and effective date.

18. Select **Create Group**.

19. The new requirement group is added to the bottom of the list on the **Curriculum Contents** tab.

Create a curriculum hierarchy (subcurriculum):

1. Using the curriculum created previously, select the **Contents** tab in the **Related** area.

2. Select **Edit**.

3. Select the **Add Content** button.

4. Select **Subcurricula** from the drop-down menu.

5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.

6. Select **Search**.

7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.

8. Select **Add**. The subcurricula are added to the bottom of the contents list.

Slide 26: Activity #2: Adding Requirements and Subcurricula

Notes:

Activity #2: Adding Requirements and Subcurricula

Create a requirement:

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the **Requirement Type** drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active** checkbox checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more from list** link.
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the **Item Pool for Requirement** section.
18. Select **Add**.

Add a requirement to a curriculum:

1. Navigate to **Learning > Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the **Related** area.
6. Select **Edit**.
7. Select **Add Content**.
8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Select **Search**.

11. Check **Add** next to each requirement to add.

12. Select **Add**. The new requirement is added to the bottom of the list on the **Curriculum Contents** tab.

13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement "required."

14. Select **Apply Changes**.

15. Optional: To group requirements: If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.

16. Select **Group Requirements**.

17. Enter group description, initial training, retraining assignment information, and effective date.

18. Select **Create Group**.

19. The new requirement group is added to the bottom of the list on the **Curriculum Contents** tab.

Create a curriculum hierarchy (subcurriculum):

1. Using the curriculum created in previously, select the **Contents** tab in the **Related** area.

2. Select **Edit**.

3. Select the **Add Content** button.

4. Select **Subcurricula** from the drop-down menu.

5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.

6. Select **Search**.

7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.

8. Select **Add**. The subcurricula are added to the bottom of the contents list.

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Documents Tab

On the Documents tab, you can:

- View the list of documents that are associated with the curriculum

- Add and delete documents from the list

- Determine whether the relationship between the corresponding version of the document and the curriculum needs to be verified

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Slide 27: Documents Tab

Notes:

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Demonstration:
Documents Tab

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Slide 28: Demonstration: Documents Tab

Notes:

Demonstration: Documents Tab

The instructor will now show the location of the **Documents** tab.

Slide 29: Knowledge Check

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Slide 30: Knowledge Check

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1.3 *Lesson 5: Initial Requirements and Retraining Requirements, Event-Based*

Slide 31: Lesson 5: Initial Requirements and Retraining
Requirements, Event-Based

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Slide 32: Lesson 5 Objectives

Notes:

Notes:

Period-Based Curricula

Session 3 | VA Talent Management System

- A set amount of time in which the user must complete the training
- There are different periods and requirements that can be required of the user for completion

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Slide 33: Period-Based Curricula

Notes:

Retraining

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- Items that must be repeated on recurring intervals will have a Retraining assignment
- Once the item is complete and recorded, it is flagged as complete
- The next Required-By date will be calculated by the Retraining assignment

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Slide 34: Retraining

Slide 35: Item Settings

Slide 36: Effective Date

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Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user, such as:

- Required

- Optional

- Recommended

A user must complete all required items to obtain a Complete curriculum status.

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Slide 37: Assignment Type

Notes:

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Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignments:

- Event Basis: Hire date or assignment date only

- Calendar Basis: A particular date on the calendar

Note: You will see Calendar Basis on your screen, but the VA does not use Calendar Basis requirements.

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Slide 38: Event vs. Calendar Basis

Notes:

Notes:

Slide 39: Event Basis

Notes:

Slide 40: Period Start Date

Slide 41: Configuring Retraining Assignments

Notes:

Slide 42: Required Dates Practice
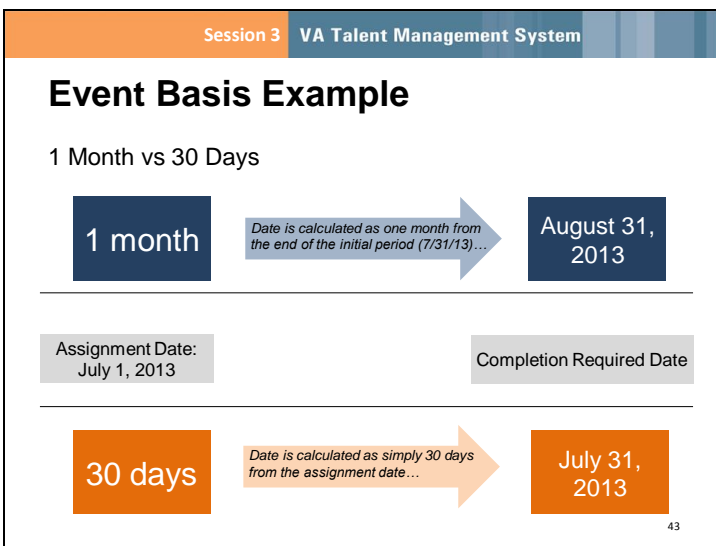
Notes:

Slide 43: Event Basis Example
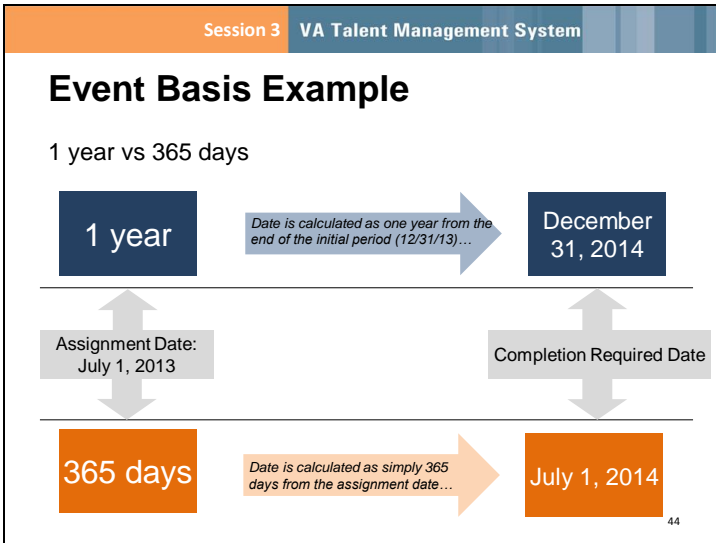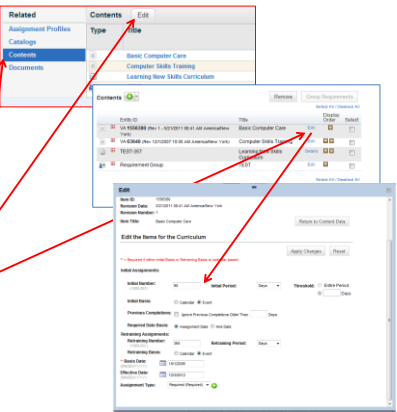
Slide 44: Event Basis Example

Slide 45: Setting and Editing Initial and Retraining Dates

Notes:

Slide 46: Demonstration: Setting Required-By Dates in a Curriculum

Notes:

Demonstration: Setting Required-By Dates in a Curriculum

For this demonstration, the instructor will find a curriculum, copy it to make it his or her own, and set dates.

1. Search for and find a curriculum and select **Contents** from the **Related** area of the record.
2. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
3. Locate the item to modify and select the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select **days** as initial period.
6. Select **event** as initial basis.
7. In the **Retraining Assignments** section, enter a retraining number.
8. Select **days** as the retraining period.

Notes:

Slide 47: Activity #3: Setting Required-By Dates within a Curriculum

Activity #3: Setting Required-By Dates within a Curriculum

1. Search for and find a curriculum and select **Contents** from the **Related** area of the record.
2. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
3. Locate the item to modify and select the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select **days** as initial period.
6. Select **event** as initial basis.
7. In the **Retraining Assignments** section, enter a retraining number.
8. Select **days** as the retraining period.

Notes:

Session 3 | **VA Talent Management System**

Knowledge Check

There are three types of requirements. Which of the following is NOT a requirement type? (Select all that apply.)

a) # Hours of specified Hour Type
b) # Hours of specified Item Type
c) # Hours of specified Hour Type from Pool of Items
d) # Items from Pool of Catalogs
e) # Items from Pool of Items

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Slide 48: Knowledge Check

Notes:

Session 3 | **VA Talent Management System**

Knowledge Check

True or False: If a user needs to complete an item on a recurring basis, you can forgo placing the item in a curriculum and just have a retraining period assigned.

a) True
b) False

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Slide 49: Knowledge Check

Slide 50: Knowledge Check

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Slide 51: Session 3 Summary

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Slide 52: Session 4 Preview

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Slide 53: Questions?

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